HOW TO CONVERT A CLIENT FROM LEGACY CA to CARE

Part One: Importing to CARE & assigning the team

Note: this may be done up to 1 week before meeting with client

1. Locate your client's case file and make note of the Legacy CA Client ID Number.
2. Log into CARE while in the office and obtain on-line status. You should see your office name on the top blue bar of your screen.
3. Select "ACTION" from the administration menu
4. Select "Client Management"
5. You will now see a screen with "Search Criteria" tab - select this option.
6. Once "Search Criteria" is selected, enter a few letters of client's last name, SSN and ACES ID. Why not enter the whole first and last name? Because you want look for any similar listings. An entry with a slight difference in spelling may actually be your client - entered by CM at HCS or another office. Less is better for this step.
7. Click **"ALL OFFICES"** (If you only search your office, the "ADD INTAKE" button will not be activated.) Now click "Search." Review any search results <u>carefully</u>. If your client is not in CARE, then proceed to next step. If client is in CARE already, do not add again.
8. Select "ADD INTAKE" on the bottom of the screen.
9. Be prepared for CARE to ask you if you are sure you want to create a new client - select YES.
10. CARE will ask you if you want to import from the Legacy CA. Select "Import."
11. Enter the Legacy CA number in the appropriate box.
12. The Legacy information will appear with a "Client" tab and a "Contact" tab. Review the information and resolve any conflicts. Select "ACCEPT" when ready.
13. The client name you imported will now appear in your tree (left side of screen)
14. Double click on the client folder.
15. Open the Client Details folder to expand the options.
16. Click the Overview screen and find the Case Worker section (lower right).

17. Click the Case Worker Ellipse button. Add your Supervisor and team Nurse to client's team by highlighting their names and transferring them to the 'selected' side. Your name was selected automatically.
18. Below the 'selected' side of the CASE worker bucket, you will see the Primary Case Manager* field. Click the down arrow and select your name from the list. Click "OK". You should now see the blue blotch by your name in the Case Worker bucket. This is an important step. Make sure the blue mark is by your name.
19. Go to the ACTION menu and select "REMOVE CLIENT FROM VIEW" If successfully removed from view, this client's folder should no longer be displayed in the navigation tree area. You may now fill in any of the screens in the Client Details folder in advance of your home visit with client. *Make sure the information is current.*

<u>Part Two: Creating the Assessment</u>

Do not create the assessment until you are actually with client, and you are ready to start your interview.

BE SURE TO **CHECK OUT** CLIENT BEFORE LEAVING THE OFFICE. The case can <u>not</u> be checked out after you leave the office!

1. Double click the "ON LINE FOLDER" and select "Check In/Out."
2. Click the **(+)** button at the top right corner of the REQUESTED CASES screen. You should see this client you recently added to CARE. Highlight that row and select OK. The name will now be listed as a "REQUESTED CASE" on the CHECK/IN OUT screen. Select "SYNCHRONIZE" from the bottom of the CHECK/IN OUT Screen.
3. Once you have synchronized, you should see a stand-alone, offline folder for this client in the navigation tree area. You will now be able to create an Initial Assessment when you meet with the client.
4. When you arrive at client's home, and are ready to begin your assessment interview, log into CARE, then select client's checked out folder (highlighted in blue). Pull down the ACTION Menu and select "CREATE NEW ASSESSMENT" and choose **"Initial Assessment."** *Note: Yes, you do want 'Initial.' Even though this is probably the client's annual <u>re</u>assessment, it is the initial one in CARE.*
5. You should now see a PENDING INITIAL assessment with the appropriate date, attached to the client's folder.

Now you can proceed with the assessment interview. Good luck!